Amarillo College

PET FORM
Planning and Evaluation Tracking
(2012-2013 Assessment Period)

Division of: Student Affairs

Person Responsible for this Division: Robert C. Austin

Department of: Financial Aid

Person Responsible for this Form: Kay Mooney

Purpose Statement (With Last Updated Date): The purpose of the Amarillo College Financial Aid Office is to assist students to receive a quality education by reducing their financial burden of education costs through aid that is provided from federal, state, and local government, as well as private resources. This includes grants, loans, scholarships and work study. Updated: 01/17/13

Goal Statement #1: Financial aid will effectively communicate with students.

Outcome/Objective Statement #1A
(Be sure to include audience, behavior, conditions, degree/benchmark, and evaluation method):
After sending letters, Carl Calls, and personally handing out cards to students, who visit the office, all students who currently receive financial aid demonstrate their satisfaction with receiving accurate financial aid information as documented by our survey.

- Results (Provide Numbers and Percentages for Quantitative Data)
    - **2009-2010 Data:** Numbers = 294 out of 6396 and 5%
    - **2010-2011 Data:** Numbers = 0 out of 0 and 0% *
    - **2011-2012 Data:** Numbers=360 out of 7203 and 5%

    *No communication methods changed as students seem to be satisfied. Academic year 2010-2011 is the off year. No survey was sent to students.

- Analysis
  (Include if benchmark was met and how results relate to outcome statement):
    - Provide Previous Data/Result Analysis
      We have been very satisfied with the information gathered from our surveys concerning the effective communication between staff and students. Due to the high number of students and phone calls that come into our office we feel it is necessary to evaluate our communication methods

- Improvements
    - List any Improvements Made in the **2011-2012** (Last Academic) Year:
        - Spring 2012 we met with Institutional Research to establish survey questions and schedule a date for the survey to be sent to financial aid students.
        - For 2011-2012, we met with Institutional Research and changed some of the survey questions to determine if our current method of communication is adequate to meet their social media needs.
    - Evaluate Why Improvements Were Successful/Were Not Successful: By updating our questions we were able to determine that email and text are their top choices for social media. However, we are seeing that students do prefer in person advising.

- Provide the Budget Information Needed to Make Past Improvements (Cost/Details): No direct cost to our budget. Financial Aid Survey was sent electronically by Institutional Research.

- Recommendations/Actions for **2012-2013**
    - Person Responsible (Who will complete the action?): Director and Associate Director of Financial Aid.
    - Action Plan:
        - Spring 2012 we will meet with Institutional Research to establish survey questions and schedule a date for the survey to be sent to financial aid students, and then measure this outcome again for the 2011-2012 PET cycle.
        - No Financial Aid Survey will be electronically sent to students this spring 2013 because we are satisfied with the results and will only do this every other year.
    - Expected Time Frame Needed to Implement Action Plan (Please provide specific deadline date): No survey will be sent this year.
    - Budget Information Needed for Future Action (Cost/Details): This is cost effective as the survey is sent electronically.

    - **Outcome/Objective Statement #1B**
      (Be sure to include audience, behavior, conditions, degree/benchmark, and evaluation method):
      After sending email notifications, post cards, envelope inserts and informing students who may have a financial aid credit balance, we will have 75% sign-up for direct deposit as determined by a Financial Aid query.
- Results (Provide Numbers and Percentages for Quantitative Data)
    - **2009-2010 Data:** No Data for 2009-2010
    - **2010-2011 Data:** Fall Numbers = 1699 out of 4495 and Percentage =s 36%
      Spring Numbers = 2491 out of 4435 and Percentage=s 35%
      Summer Numbers = 779 out of 1502 and Percentage=s 52%

    - **2011-2012 Data:** Fall Numbers= 2090 out of 4634 and Percentage =s 46%
      Spring Numbers= 1788 out of 4216 and Percentage=s 43%
      Summer Numbers = 662 out of 1244 and Percentage=s 54%

- Analysis
  (Include if benchmark was met and how results relate to outcome statement):
    - Provide Previous Data/Result Analysis
      Even though our benchmark of 100% was not reached and we have now changed our benchmark to 75% as we realize not all students will have a checking account. We will continue to pursue this objective as it is a convenience for the student and cost saving for the college.

- Improvements
    - List any Improvements Made in the **2011-2012 (last academic) year**
      We reevaluated the survey questions pertaining to direct deposit and provided a link to sign up for direct deposit. All correspondence from the Financial Aid Office includes Direct Deposit Information.
    - Evaluate Why Improvements Were Successful/Were Not Successful:
      Improvements were successful our numbers were higher for the 2011-2012 year and students are more informed.

- Provide the Budget Information Needed to Make Past Improvements (Cost/Details): The only direct cost to our financial aid budget is the printing of the Direct Deposit Cards of $600 per year.

- Recommendations/Actions for **2012-2013**
  - Person Responsible (Who will complete the action?): Financial Aid Office
  - Action Plan: To continue to inform financial aid students verbally, by email and with Direct Deposit. Information will be inserted into all outgoing mail. We will then measure this outcome again for the 2013-2014 PET cycle.
  - Expected Time Frame Needed to Implement Action Plan (Please provide specific deadline date): This action plan is implemented on a daily basis by the Financial Aid staff.
  - Budget Information Needed for Future Action (Cost/Details): The only direct cost to our financial aid budget is the printing of the Direct Deposit cards of $600 per year.

Goal Statement #2: After AC establishes a "financial resources" office, all students and their families will be offered free financial literacy training (AC Strategic Plan through 2015: Strategy 1.1; No Excuses - Poverty).

Outcome/Objective Statement:
(Be sure to include audience, behavior, conditions, degree/benchmark, and evaluation method):
After visiting the new Student Money Management Office, 85% of clients will report that their "money management skills" are improved or very improved as reported by Office client exit survey (AC Strategic Plan through 2015: Task 1.1.3.2).

- Results (If Applicable, Provide Numbers and Percentages for Quantitative Data)
  Not applicable - new goal.
- Analysis
  - Provide Previous Data/Result Analysis
    Not applicable – new goal

- Improvements
  Not applicable – new goal
  - List any Improvements Made in the **2011-2012** (Last Academic) Year
  - Evaluate Why Improvements Were Successful/Were Not Successful:
  - What Budget Implications Were Involved with this Improvement? (Please Provide Cost Estimate/Details):

- Recommendations/Actions for **2011-2012**
  - Person Responsible (Who will complete the action?): To be determined.
  - Action Plan: Per Strategic Plan office to be established in Fall 2013. Meetings with the appropriate staff for planning and implementing the new Student Money Management Office will begin this spring 2013.
  - Expected Time Frame Needed to Implement Action Plan (Please provide specific deadline date):
    Per Strategic Plan office to be established in Fall 2013
  - What Budget Implications Are Involved with this Action? (Please Provide Cost Estimate/Details):
    Grant funds – to be determined

Goal #3 (Previously Goal #2): Ensure Student Access (AC Strategic Plan through 2015: Strategy 2.3)

Outcome/Objective Statement
(Be sure to include audience, behavior, conditions, degree/benchmark, and evaluation method):
After staff of Financial Aid and AC Foundation develop a training session for employees regarding all options for financial aid for both credit and CE students, CTL will offer the session at least twice a year (AC Strategic Plan through 2015: Strategy 2.3.3.1)

- Results (Provide Numbers and Percentages for Quantitative Data)
  No action was taken or results compiled because this item was removed from the Strategic Plan. Per the "Strategic Plan through 2015 – Task Accomplishment Report" in which the Chief of Planning and Advancement compiled information from key stakeholders at the institution, the following information was noted in the "Comments" section:

  > "Students enrolled in eligible CE programs may apply for TPEG-CE (Texas Public Education Grant – Continuing Education) funds. The Financial Aid Office receives the approval from CE that the student is in an eligible state funded program. The Financial Aid Office continues the process of awarding eligible students.

  Analysis

  Although the comments provided in the accomplishments report does not include a clear reference to training session development or CTL trainings, the status was marked as complete and this item was removed from the newest version (version 2.0) of the Strategic Plan Version. Therefore, it's assumed the original outcome was not really what was intended to be accomplished or that the outcome was accomplished in some way not cited in the comments section.

- Improvements
  Not applicable

- Recommendations/Actions for **2012-2013**
  - Person Responsible (Who will complete the action?): Financial Aid and AC Foundation
  - Action Plan: There is no action plan. This Objective Statement, Task 2.3.3.1 is no longer in the Strategic Plan and was not developed by Financial Aid so this goal and outcome will be removed from future PET forms.
  - Expected Time Frame Needed to Implement Action Plan (Please provide specific deadline date):None
  - Budget Information Needed for Future Action (Cost/Details): No cost to any budget.